

# Annual Insurance Review Checklist

In a perfect world, you would just call The Agent every time you got a new job, did a house renovation, or purchased a new car. Well, life gets busy. This is where an annual coverage review comes in. A coverage review is a general check-in with The Agent. During this review, you will meet with The Agent and share your life changes that might affect your insurance needs.

## Life Changes to Tell The Agent About:



**You got married (or divorced)**



**Your child is going to college**



**You're considering a renovation or addition**



**You started (or will be starting) a new job/business - even if it's homebased**



**You bought (or are going to buy) a new car**



**You're switching auto lenders or mortgage**



**You had (or are planning to have) a baby**



**You're moving**

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## What Info to Have:

- Updated employment information.** If you just retired, plan to, are working from home permanently, or just switched jobs, mention it to The Agent.
- List of covered drivers.** A list of your current drivers and any new ones. Such as your child who just got their license.
- List of home updates.** If you just completed a renovation on your home or you plan to, make sure you contact The Agent.
- Updated personal information.** Mailing address, phone number, email address, members of household, name change documentation, etc.
- Information for new purchases.** We do not mean that new shirt... we mean a big purchase! A big purchase like an RV, a boat, ATV, etc. Expensive jewelry or a musical instrument is also included.

**Ready to get started?**

Talk to your local Agent to request a quote at <https://www.theagentinsurance.com>

